

We are committed to helping you take maximum control of your tax and financial situation.
So we may serve you more effectively, please fill out this packet in its entirety.

PLEASE UPDATE YOUR RECORD

Contact Information

Name	Spouse
Address	Address (If different)
City State Zip	City State Zip
Home Phone	Home Phone
Mobile	Mobile
Email	Email
Major Life Changes	<input type="checkbox"/> Marriage <input type="checkbox"/> Divorce <input type="checkbox"/> Laid Off <input type="checkbox"/> Retired <input type="checkbox"/> New Business <input type="checkbox"/> New Job <input type="checkbox"/> College <input type="checkbox"/> Baby <input type="checkbox"/> Moved <input type="checkbox"/> Other: _____

Extension Discount

Put my return on extension if I qualify

- May / June – **Save 10%**
- July / Aug / Sept – **Save 15%**

This offer cannot be combined with the New Client Discount or the Drop-Off Discount. Other exclusions may apply.

Financial Priorities

Please contact me for a complimentary review of my **Financial Objectives**.

Please check all that apply:

- Minimize income taxes
- Business planning
- College funding
- Investment portfolio diversification
- Reduce investment volatility
- Will(s) or estate planning
- Life, disability, or long term care insurance
- Other _____



IMPORTANT

At any time during the tax year did you have an interest in, OR a signature authority over a

foreign financial account,

OR did you receive a distribution from, OR were you the grantor of, OR transferor to, a foreign trust?

YES NO NOT SURE

INITIALS _____

SERVICE AGREEMENT

DETAILS

WHAT YOU SHOULD KNOW ABOUT JOSEPH CAHILL & ASSOCIATES / WORTHTAX INCOME TAX PREPARATION SERVICE

Our Responsibilities

We Will:

- Prepare your income tax return – Federal and State(s) from information you furnish to us
- Electronically file all qualifying returns
- Use professional judgment, in your favor whenever possible, in resolving questions where tax law is unclear
- Maintain a copy of client tax returns and documentation for a minimum of three years

We Will NOT:

- Audit or independently verify the data you provide us
- Attempt to discover defalcations or irregularities
- Respond to inquiries by a tax authority. We offer those services under a separate agreement

Client's Responsibilities

You must:

- Provide all the information required to produce a complete and accurate return. The law provides for costly penalties for inaccurate returns
- Comply with the IRS substantiation and documentation requirements of deductible expenses
- Retain supporting documents for 7 years (or for capital assets, until 6 years after sale)

Fees & Billing

- Preparation fees are based on the complexity of the return
- Price quotes will only apply if the information supplied by the client was accurate and complete
- Minimum fees will apply based on our hourly rate whether or not we ultimately complete the return
- Tax Return copies: \$20 initial copy, \$5 each thereafter

Billing

- Invoices are due and payable at the time of pickup
- Unpaid invoices: subject to \$10 per month rebilling fee, 1.5% per month late payment charge
- Returned check fee: \$25

Additional Work

We may charge additional fees for:

- Repeated requests for information
- Significant extra time for research
- Accounting or bookkeeping necessary for return preparation
- Services not specifically stated in this letter

Deadlines

INITIAL FILING DUE DATE: APRIL 15th

If all information is not received by April 1st, we reserve the option to place your return on extension, which:

- May extend the time available for a government agency to undertake an audit of your return
- Extends time to file, **NOT the time to PAY ANY TAXES** that are due

We do not take any responsibility for penalties or interest that result from late payment or filing.

Document Pick Up

- When the return is completed and paid for, you can pick up your documents at your designated retail site
- Positive ID may be required. A signed authorization will be required to release your documents to a third party
- Upon your request, we will mail your documents via USPS Priority mail at no charge. Clients use this method at their own risk and take full responsibility for the timeliness and quality of their service

CLIENT ACKNOWLEDGEMENT & ACCEPTANCE

PRINT NAME: _____

SIGNATURE: _____ DATE: _____

TAX RETURN INFORMATION

Tax Year 2019

DETAILS

Our Privacy Commitment	<i>We recognize that our relationship with you is based on integrity and trust. We work hard to maintain your privacy and are very careful to preserve the private nature of that relationship. At the same time, the very nature of our business sometimes requires that we collect or share certain information about you internally within our offices to help you reach your financial goals.</i>
Federal Law	Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.
Complaints	If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov .
Authorization	I authorize Joseph Cahill & Associates / WorthTax to share relevant information I provide in connection with the preparation of my 2019 tax return to WorthPartners to determine my eligibility for, inform me about, or offer me advice, services, and consultations to address tax and financial issues of concern to me.
Duration	Consent is valid until April 30 th , 2021. We will not use or disclose your tax information for any other purpose in connection with this consent, except as required or permitted by law.

CLIENT ACKNOWLEDGEMENT & ACCEPTANCE:

PRINT NAME: _____

SIGNATURE: _____ DATE: _____

... on second thought
Why not take tax season off
 Go on extension



De-stress and save 10-15% off the cost of preparation!*

DETAILS		WHAT YOU SHOULD KNOW ABOUT AN EXTENSION TO FILE
Federal and State Laws	Both the Internal Revenue Service and the State Department of Revenue allow you to extend the time for filing your income tax return for a period of six months without the necessity of providing an explanation. This automatic extension covers the time to file, not the time to pay! If you do not pay the tax due by the regular due date (generally, April 15 th), you will owe interest and may also be charged penalties. The extension to file must be filed by the regular due date in order to be effective. The return can be filed any time before the six month extension expires.	
Our Responsibilities	We will: <ul style="list-style-type: none"> ➤ Use professional judgment in resolving questions where tax law is unclear. ➤ Maintain a copy of extension documentation for a minimum of three years. ➤ Electronically file all qualifying extensions. We will <u>NOT</u>: <ul style="list-style-type: none"> ➤ Verify that taxing authorities have received estimated tax payments. ➤ Take any responsibility for penalties or interest that result from late payment. 	
Client's Responsibilities	You must: <ul style="list-style-type: none"> ➤ Make all timely required tax payments to the IRS and the State DOR. ➤ Provide all information required to file an extension. 	
Tax Payment Requirements	<ul style="list-style-type: none"> ➤ An extension to file is not an extension to pay. Tax payments are generally due by April 15th. ➤ Failure to pay taxes by April 15th may result in penalties and interest from the IRS and the DOR. ➤ The IRS charges a variable interest rate on unpaid tax up to 25% until the tax balance is paid in full. ➤ The IRS can assess a Failure-to-Pay and/or Failure-to-File penalty on all balances not paid by April 15th even if an extension is filed ➤ Refer to IRS Notice 746 for current interest rates. ➤ Please refer to the Department of Revenue for applicable state requirements. 	
Deadlines	FILING DUE DATE: October 15 If all information is not received by October 1 st , we cannot guarantee the timely completion of your return: <ul style="list-style-type: none"> ➤ Failure to file may result in additional penalties and interest from the taxing authority. ➤ We do not take any responsibility for late filing penalties or interest. ➤ We reserve the right to refuse an extension discount if all tax documents are not received by October 1st. 	

CLIENT ACKNOWLEDGEMENT & ACCEPTANCE

PRINT NAME: _____

SIGNATURE: _____ DATE: _____

*You may qualify to receive 10-15% off the cost of preparing your return by filing an extension. See your preparer for details. This offer cannot be combined with the New Client Discount or the Drop-Off Discount. Other exclusions may apply.